TIGTA HR Connect Policies and Procedures

Quick Reference Guides (QRG's) on common HR Connect actions and topics have been added to the TIGTA Customer Page under the Human Resource Services/HR Connect area. These guides are to be used for specific, step-by-step instructions on how to submit various actions through HR Connect as well as to identify what type of action should be used and when it should be used.

The remainder of this document contains additional questions not answered in the Quick Reference Guides and provides additional TIGTA requirements for common actions, such as award processing. (8/8/05)

All Employees

How do I sign-up for HR Connect?

See Quick Reference Guide. (8/8/05)

Once I'm registered in HR Connect, how do I log in again? (9/15/04)

A direct link to HR Connect has been added to TIGTA Homepage, to the far left of the screen.

To log back into HR Connect click on the link and *enter either your USER ID supplied during the activation process OR your full TIGTA e-mail address*; you do not have to input both. However, you need to keep your USER ID in a secure place; if you forget your password and request a new password, you will be asked to supply your USER ID.

Do I have to update my personal information and emergency contact information in HR Connect?

No, employees are not required to complete/update the personal information data or emergency contact data in HR Connect. PARIS will continue to be TIGTA's official source of employee emergency contact data.

Do I have to use HR Connect to initiate an address change?

No, employees may initiate a home address change through HR Connect or through existing systems such as Employee Express.

May I initiate my own resignation or retirement action?

Yes, employees may self-initiate a resignation or retirement personnel action; although employees will not be required to do so. If an employee initiates one of these actions, the HR Connect system will automatically notify the employee's manager of record of the request.

TIGTA HR Connect Policies and Procedures

Managers are still required to follow Employee Exit Clearance Procedures contained in TIGTA Operations Manual Chapter 600 70.3 once notified of an employee's departure from TIGTA, regardless if notification is from the employee directly or from BPD Human Resources.

Who do I contact if I experience system performance issues?

If you experience performance problems or receive blank screens in HR Connect, first try clearing your computer's cache by:

- Open Internet Explorer
- Select Tools
- Select Internet Options
- Select General Tab
- Click Delete Cookies, select OK
- Click Delete Files, select OK; you will also be given the option of deleting locally stored offline contact, you can select OK if you wish
- Click Clear History, select Yes

If you continue to have performance problems in HR Connect, contact the BPD Support Desk at (304) 480-8000, then press 4 for HR Connect assistance.

Managers and Proxies

I don't see my Manager Profile tab, what should I do?

The first time you log into HR Connect, you will see only the Employee and Report Output tabs. The HR Connect system automatically builds Manager Profile tabs at 10:00 AM, 12:00 PM, 2:00 PM, and 4:00 PM each day. If you do not see your Manager tab after a few hours, you should contact the BPD Support Desk at (304) 480-8000, then press 4 for HR Connect assistance.

When will I be able to submit a personnel action or see the employees assigned to me in HR Connect?

You will be able to submit personnel actions within 2 hours of your Manager Profile being activated. It will take 24 hours before you can be selected as an authorizer on a personnel action. (8/8/05)

The employees listed in my "People and Positions" area are incorrect. What do I do? (8/8/05)

If you see errors in the employees assigned to you, email **hrsystems@bpd.treas.gov** describing the errors. BPD Human Resources will correct the errors.

TIGTA HR Connect Policies and Procedures

May I delegate an Office Manager or Office Assistant to initiate personnel actions for me?

Yes. To establish a proxy, refer to the Quick Reference Guide. (8/8/05)

To assign proxy rights to your Office Manager or Office Assistant, you should initiate these rights **without granting approval rights.** When your proxy initiates a position description classification request or a recruit request, you will receive an email notifying you that the action was submitted as long as your proxy enters your full email address in the email field within the action. **Caution:** See the questions on how to submit a vacancy announcement request and a request to classify a position description for information concerning proxy submissions.

How do I designate a fellow manager as my delegate to approve personnel actions in my absence?

Use the "Pick a Proxy" feature to select the manager who will act in your absence by selecting the "Approval" role. Actors should notate in the "Comments" area that they are serving as an actor when approving the personnel action.

As a proxy, when I initiate a personnel action on my manager's behalf, the action goes directly to the second-line manager for approval without my manager reviewing the action for approval or disapproval. How can I change this? (2/1/05)

Proxies must select the correct manager as the 1st Authorizer before submitting the personnel action. Proxies must change the 1st Authorizer to the manager they want to first review the action. To do this, click on the magnifying glass next to the 1st Authorizer field, enter the last name of the manager who should review the action first, and select search. When the correct manager's name appears, click on it and the 1st Authorizer field will be updated. Then, submit the action to the 1st Authorizer.

Note: Proxies do not have their own profile; they inherit the workflow profile of the manager for whom they are acting as proxy. Managers cannot set up a workflow profile with their own name in any of the authorization levels. Therefore, if a proxy initiates an action for a manager and needs to send the action to that manager for approval, the above steps must be taken.

What information should be contained in all requests for personnel action? (11/4/04)

In addition to the specific information requested by each type of action, the following information must be included in all requests for personnel action:

- Phone number of manager requesting action and/or proxy initiating action; this information will assist BPD if questions arise concerning the action.
- The cost code to which to the employee is assigned or will be transferred to; cost code information is contained on your functional organizational charts. You should include the cost code in the Comments area of the action.

Who approves the actions I submit?

Existing functional approval levels for all personnel actions remain the same. You or your proxy must submit all personnel actions for approval in the HR Connect system according to your existing functional guidance.

How do I know if any personnel actions are awaiting my approval?

You should receive email notification from the HR Connect system when an action is awaiting your review and approval. In addition, the "Worklist" area of HR Connect will identify actions awaiting your review and approval.

How can I check on the status of a personnel action I submitted?

When a personnel action is submitted in HR Connect, the system will be updated as soon as the BPD Human Resources staff releases the action to the National Finance Center (NFC). You can check the status of an action by selecting the employee in question and then selecting "Pending Actions." Actions not appearing in "Pending Actions" have been completed and sent to NFC.

What information is contained in the "Workforce Analytics" section?

This section contains summary reports on various items for TIGTA and other Treasury bureaus. These reports will be used by the Human Resources staff and the EEO Officer and may also be used by senior functional management.

What information is contained in the "Reports" section?

This section contains various information such birthdays and pending personnel actions for employees in your group.

What do I need to do to make sure an employee is reassigned to the correct position description? (10/15/04)

You must include the new position description number in the comments section of the reassignment action. When the action is submitted to the approving official, the approving official will see the grade and title of the position, not the position description number. BPD will confirm that the new position description number listed in the comments section of the action matches the new position description number the employee is to be reassigned with the associating action.

How do I submit an award to Human Resources for processing? (8/8/05)

All awards will be submitted through HR Connect. BPD Human Resources will return any award nomination received through any other means. Managers will continue to prepare a 1-page narrative justification for the award to be processed. Narratives will continue to be presented to employee using existing policies; a copy will be placed in the employee's drop file.

For step-by-step instructions on submitting awards, see the Quick Reference Guide. In addition to the steps identified in the Quick Reference Guide, the following information and/or actions are required for awards:

- Account Code - this will be the cost center code that you want the award charged to. ***Award account codes for each group are identified in TIGTA Memorandum 04-33 under the Awards Column***
- Justification - select the appropriate reason in the "Justification" drop down box: Based on Summary Rating (for Performance awards only), or Other (for Special Act awards)
- Create the narrative in Word. Use the instructions below to copy the text into HR Connect.
- Once narrative is final, select "Control A," (Control A will capture the entire Word document) and then select Copy. The text of the narrative must be copied into HR Connect in the Justification box. Note: Only the text of the narrative will copy, no formatting will transfer into HR Connect. The justification can be viewed in HR Connect up until the award nomination is submitted to BPD Human Resources. Once submitted to BPD Human Resources, only a systems administrator can retrieve the justification. Therefore, managers must continue to create an award justification in a separate Word document.
- The following information will be placed at the heading of the narrative:
    - Employee Name
    - Type of Award (Performance/Special Act)
    - Period Covered

NOTE: All award actions contain a Comment area. This area should be used to communicate any issues that BPD Human Resources should be aware of. In addition, use the Comment area to identify the following information to be placed on the employee's award certificate:

- ***NAME, TITLE, MAILING ADDRESS, and PHONE NUMBER of manager that will sign the award certificate*** (2/1/05)

<u>Mass Awards</u>

- Only to be used for group Special Act Awards, such as the IG Awards, or group special accomplishments; not to be used to submit performance awards for multiple employees.

Foreign Language Proficiency Awards

- Investigations managers should refer to (400) 420 Foreign Language Proficiency Award Program for instructions on submitting foreign language proficiency awards. (1/3/05)

Note: TIGTA will not use Individual Suggestion awards as we have no such program at this time.

How do I submit a request to open a vacancy announcement? (8/8/05)

Existing approval levels remain the same for all personnel actions, including recruitment requests. **BPD Human Resources will continue to follow-up with TIGTA Human Resources to ensure proper approval before opening any vacancy announcement**.

For specific, step-by-step instructions on how to submit a recruitment request, see the Quick Reference Guide.

- Among other questions, you will be asked to choose the advertising duration with three options – Normal, Extended, Unknown. The Normal TIGTA duration is 2 weeks; if you want the announcement to be open longer than 2 weeks, select Extended. In the comments section on the last screen, you should state the length of time the announcement should remain open. Similarly, if the announcement is to be open less than 2 weeks, you should select Unknown, and state the length of time in the comments section on the last screen.
- TIGTA is not currently using the Competency information contained on Screen 7, you can ignore this section
- REMEMBER: you need to place the cost code for the group you are recruiting for in the Comment area; the cost code can be found on your functional organizational charts. (10/15/04)

You are still required to provide the BPD Human Resources approval for the payment of relocation expenses; you may continue to send this approval via email. BPD Human Resources will follow-up with the requesting manager to answer any questions about the request and to provide a draft copy of the vacancy announcement for review before it is posted. If necessary, crediting plans should be created in a Word document and emailed to the BPD Human Resources specialist working the recruitment request.

TIGTA HR Connect Policies and Procedures

The Deputy Chief Counsel will work with the TIGTA Director, Human Resources, to enter attorneys hired directly under the excepted service provisions into the HR Connect system.

How do I submit a request to announce a position that is not currently vacant?

TIGTA policy prohibits opening a vacancy announcement prior to the position becoming vacant. Requests to waive this policy must be submitted to the Assistant Inspector General for Management Services by the Deputy Inspectors General, Assistant Inspector General for Information Technology, or the Chief Counsel.

How do I submit a request to classify a position description?

See the Quick Reference Guide.

HR Connect does not allow for on-line approvals on position description classification requests, however, an email can be sent to the manager/supervisor requesting the new classification by entering their full email address in the email field within the action. Once the classification request is entered into the HR Connect, it will go directly to BPD Human Resources. However, you are required to obtain prior approval for all classification requests. BPD Human Resources will follow-up with TIGTA Human Resources to ensure proper approval before processing any classification requests.

You may continue to email BPD Human Resources a draft position description or a copy of a position description from another agency you wish to use as an example.

How do I initiate a career-ladder promotion?

See the Quick Reference Guide.

May I delete any of the Vacant Positions shown in my Workgroup?

No, only the TIGTA Director, Human Resources, and the Assistant Inspector General for Management Services/Chief Human Capital Officer can authorize BPD Human Resources to delete these positions from the HR Connect system.

How do I obtain a copy of a position description?

See the Quick Reference Guide.

How do I submit a retention allowance action for an employee?

Existing criteria contained in TIGTA Operations Manual Chapter 600 70.11.8 will continue to be followed. Once the Retention Allowance Certification/Recertification Form and Worksheet is completed, the requesting function head should email the form to the Director, Human Resources, who will obtain the Inspector General's concurrence with the retention allowance request. Once concurrence is obtained, the Director, Human Resources, will forward the action to BPD Human Resources for processing.

How do I submit other types of personnel actions?

First, review the Quick Reference Guides. If the action is not listed, you or your proxy should contact **hrsystems@bpd.treas.gov** for instructions.